

TASMANIAN TOURISM SNAPSHOT

YEAR ENDING JUNE 2024



Lake Oberon, Western Arthur Range
Southwest National Park
© Mark Reid

TASMANIA

COME DOWN FOR AIR



Tourism
Tasmania

TASMANIAN TOURISM SNAPSHOT

OVERVIEW AT YEAR ENDING JUNE 2024

Post-pandemic recovery peaked more than a year ago (year ending March 2023) when significant pent-up demand for travel among Australians saw Tasmania experience record spend and a near full recovery of visitation, despite very low levels of international travel at that time.

As international borders opened and overseas outbound travel increased, the latter half of calendar year 2023 saw a softening in interstate travel by Australians into Tasmania. In the year ending June 2024, however, a strong rebound in visitation through summer 2023–24 and flow on into autumn, coupled with increasing rates of return from key international markets, drove a reversal of that trend, leading to elevated spend and nights (up 39% and 18%, respectively) and almost full recovery (down just 1%) of visitation compared to the same period in 2019.

Rising costs of living continue to place pressure on households and travel decisions Australia wide. Additionally, increasing costs of operating businesses may erode the benefit of any elevated spend from visitors.

Meanwhile, the share of domestic versus international visitors to the state has settled to pre-COVID levels, with the market share for international visitation in the year ending June 2024 at 15.5%, the same as year ending June 2019.

The data presented in this report, as well as visitor behaviours and demographics, can be explored in greater detail using the free, online interactive TVS Analyser dashboard www.tvsanalyser.com.au

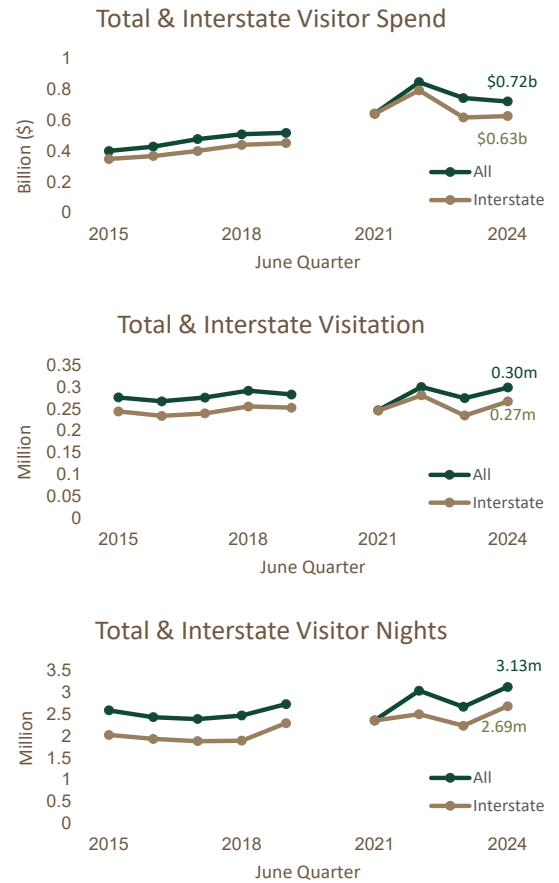
KEY INSIGHTS

- Tasmania's primary tourism market are interstate holiday visitors, and as with all other state and territories, the state has seen a softening in travel from this market, particularly coming into the cooler months.
- Somewhat countering the softening in holiday trips, visitors from Victoria and Queensland set records for visitor nights. For Victoria there was strong growth in business visitor nights, and for Queenslanders to visit friends and relatives living in Tasmania.
- Visitors are still spending far more each compared to before the pandemic (around +\$769), however there is a slow down in spending as from last year.
- Interstate and international visitors continue to stay longer in the state, setting a new record high for nights, with interstate visitors staying more than two nights longer than in 2019.
- While international visitation to Tasmania overall had not quite fully recovered to pre-COVID levels in YE June 2024 (visitors 85% of YE June 2019), the state has however recovered to traditional shares of international visitors to Australia, and critically also for the states core market of holiday trips.
- Tasmanians took more overnight trips within the state (+21%), for more nights (+15%), leading to an increase in spend (+6%) compared to 2023.

JUNE 2024 QUARTER

Spend in the June quarter of 2024 totalled \$722.5m, falling 3% from the same quarter of 2023 (\$744.5m), as visitors spent around 11% less each on their stay in Tasmania. Compared to 2019 however, visitors spent an additional \$586 each on average in this quarter, leading to total expenditure increasing 39% (or \$204m) over the last five years.

Average length of stay (10.3 nights) for interstate holiday visitors is down around a night (-0.9 nights) below both last year and levels seen pre-COVID, while the average across all interstate visitors has remained at an elevated level (10.1 nights, up half a night on 2023 and up 1 night on 2019) since 2021 due to longer stays by trips to visit friends or relatives (VFR) in Tasmania.



JUNE QUARTER	All Visitors				Interstate Visitors			
	2023	2024	Quarter Change	Change on 2019 ³	2023	2024	Quarter Change	Change on 2019
SPEND	\$744.5m	\$722.5m	-3.0%	+39.4%	\$618.1m	\$627.4m	+1.5%	+38.7%
VISITORS	274.8k	298.9k	+8.8%	+5.6%	235k	267.2k	+13.7%	+5.7%
NIGHTS	2.67m	3.13m	+17.0%	+14.4%	2.24m	2.69m	+20.1%	+17.0%
ASPV	\$2,710	\$2,417	-\$292	+\$586	\$2,630	\$2,348	-\$282	+\$558
ASPN	\$278	\$231	-\$47	+\$41	\$276	\$233	-\$43	+\$37
ALOS (NIGHTS)	9.7	10.5	+0.7	+0.8	9.5	10.1	+0.5	+1.0

REGIONAL VISITATION

In the June quarter of 2024, the Southern and North West regions set new records for nights in a June quarter, while Northern and West Coast also saw increases from 2023. The East Coast however saw fewer visitors and nights this quarter than for the

same time last year, primarily from a drop in interstate holiday stays. All regions saw more visitors than in the June quarter of 2019, while for nights, East Coast and West Coast saw declines.

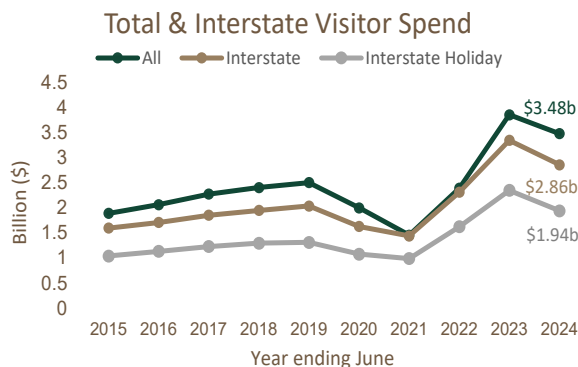
ALL VISITORS JUNE QUARTER	Visitors ('000)				Nights ('000)			
	2023	2024	Quarter Change	Change on 2019	2023	2024	Quarter Change	Change on 2019
SOUTHERN	221.3	227.2	3%	1%	1,341.0	1,493.5	11%	20%
NORTHERN	132.6	160.3	21%	9%	361.7	620.9	72%	0%
EAST COAST	81.3	76.6	-6%	2%	251.1	214.1	-15%	-1%
W X NW	113.4	113.8	0%	11%	525.9	616.4	17%	16%
NORTH WEST	110.1	111.1	1%	14%	427.7	463.3	8%	26%
WEST COAST	39.6	39.4	-1%	9%	98.2	153.1	56%	-6%

YEAR ENDING JUNE 2024



VISITOR SPEND

In the year ending (YE) June 2024, total spend across all interstate & international visitors was \$3.478 billion, down 9.7% on 2023, though up \$974 million (38.9%) from 2019. Average spend per visitor has fallen by 10% (\$338) from YE June 2023, but was \$770 more each than in 2019.

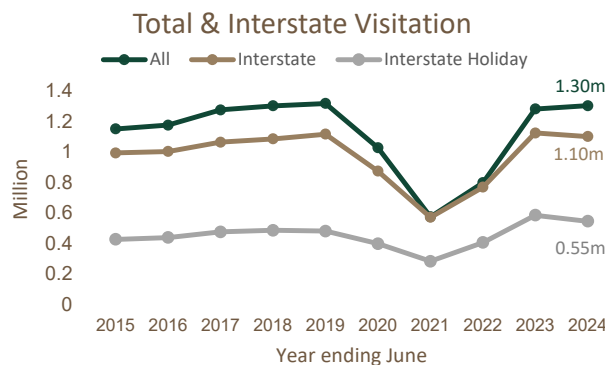


VISITOR SPEND	YE Jun 23	YE Jun 24	Annual Change ¹	Change vs YE Jun 2019
ALL²	\$3.853b	\$3.478b	-9.7%	+38.9%
INTERSTATE	\$3.345b	\$2.858b	-14.6%	+40.3%
INTERSTATE HOL.	\$2.349b	\$1.941b	-17.4%	+47.9%



TOTAL VISITORS

Tasmania welcomed 1.302m visitors in the year ending June 2024, up 1.7% on 2023, and less than 1% down from the 1.315m visitors in YE June 2019. 15.4% were international visitors, demonstrating the return of Tasmania's international market share to pre-COVID levels.

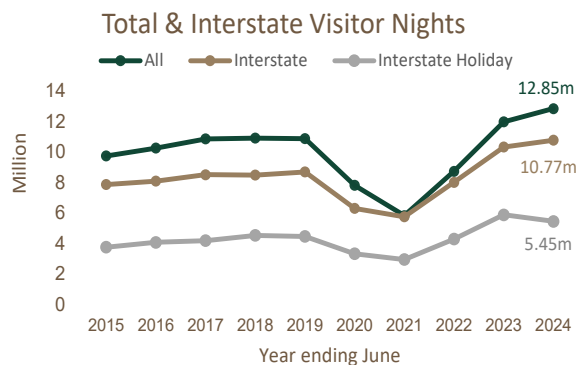


TOTAL VISITORS	YE Jun 23	YE Jun 24	Annual Change	Change vs YE Jun 2019
ALL	1.280m	1.302m	+1.7%	-1.1%
INTERSTATE	1.122m	1.099m	-2.1%	-1.4%
INTERSTATE HOL.	0.585m	0.546m	-6.7%	13.4%



VISITOR NIGHTS

The year ending June 2024 set a new record for total visitor nights (12.85m), primarily due to interstate visitors spending an extra two nights, on average, in the state than they did in 2019. In particular, visitors who brought their own car or 4WD (without a caravan or camper) across on the Spirit of Tasmania contributed significantly to the growth in nights.



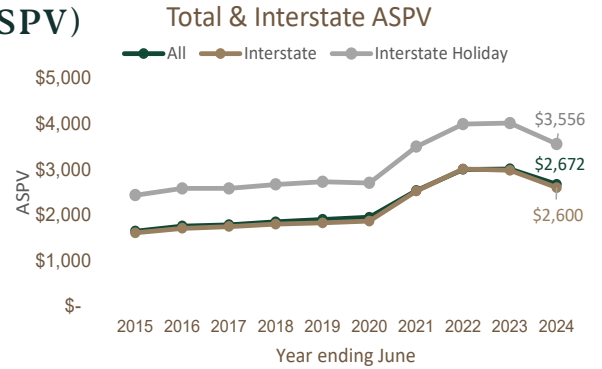
VISITOR NIGHTS	YE Jun 23	YE Jun 24	Annual Change	Change vs YE Jun 2019
ALL	11.98m	12.85m	+7.2%	+18.1%
INTERSTATE	10.32m	10.77m	+4.4%	+23.9%
INTERSTATE HOL.	5.88m	5.45m	-7.3%	22.1%

KEY METRICS



AVERAGE SPEND PER VISITOR (ASPV)

Average spend per visitor (ASPV) was \$2,672 in year ending June 2024, down 11% from 2023, and 40% more than the same period in 2019. Interstate holiday visitors spent an average \$3,556 each (\$459 less than in 2023). However rising costs of living and doing business may mean the extra spend is not flowing through to operators however. Accommodation is the largest category for interstate holiday spend, and was up to 47% of their spend from 43% in 2019.

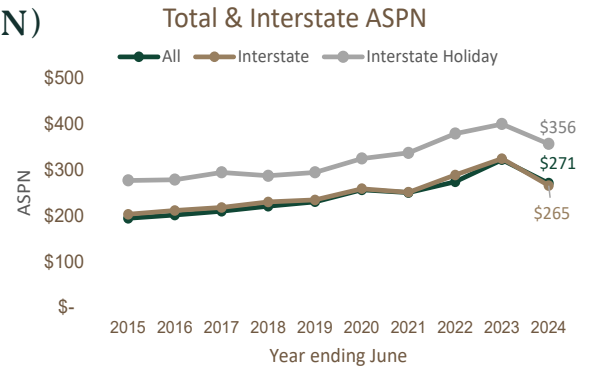


VISITOR SPEND	YE Jun 23	YE Jun 24	Annual Change	Change vs YE Jun 2019
ALL	\$3,010	\$2,672	-\$338/visit	+\$769/visit
INTERSTATE	\$2,980	\$2,600	-\$380/visit	+\$773/visit
INTERSTATE HOL.	\$4,015	\$3,556	-\$459/visit	+\$828/visit



AVERAGE SPEND PER NIGHT (ASPN)

Longer stays in the state in year ending June 2024 led to overall declines in average spend per night for all visitors. ASPN was \$271, down 16% (-\$51) on YE June 2023, up 18% (+\$41) on 2019. Interstate holiday visitors spent \$44 less than 2023, though an extra \$62 per night compared to 2019.

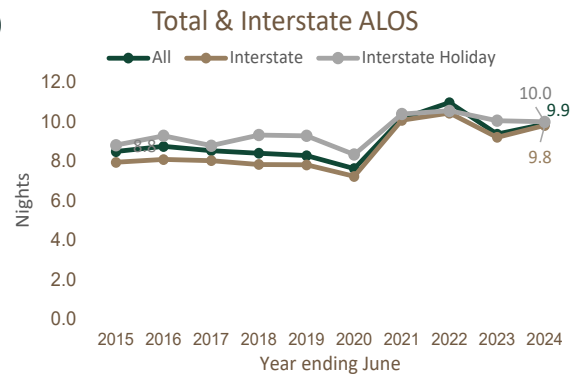


TOTAL VISITORS	YE Jun 23	YE Jun 24	Annual Change	Change vs YE Jun 2019
ALL	\$322	\$271	-\$51/night	+\$41/night
INTERSTATE	\$324	\$265	-\$59/night	+\$31/night
INTERSTATE HOL.	\$400	\$356	-\$44/night	+\$62/night



AVERAGE LENGTH OF STAY (ALOS)

While average length of stay was up half a night on 2023, and 1.6 nights on 2019, there has been a loss of around 1 night since the peaks in ALOS seen in 2021 and 2022. Elevated ALOS is primarily driven by interstate visitors; of these, holiday-makers stayed 10.0 nights (on par with 2023, up 0.7 nights on 2019) and VFR stayed 9.0 nights (on par with 2023, up 2 nights on 2019).



VISITOR NIGHTS	YE Jun 23	YE Jun 24	Annual Change	Change vs YE Jun 2019
ALL	9.4	9.9	+0.5 night	+1.6 nights
INTERSTATE	9.2	9.8	+0.6 night	+2.0 nights
INTERSTATE HOL.	10.0	10.0	-0.1 night	+0.7 night

KEY MARKETS

INTERSTATE MARKETS

The vast majority of Tasmania’s visitors are from interstate (84%), with VIC, NSW and QLD accounting for 71% of all visitors to the state (or 84% of interstate visitors).

VICTORIA

Traditionally the largest single market, VIC was the only top-three interstate market (VIC, NSW, QLD) to see more visitors than in 2023 (+4%). Although the number of visitors has not fully recovered to pre-COVID visitation, they did however stay longer leading to a record number of nights in Tasmania, 3.13m (up 4% on 2023, up 13% on 2019). Total spend (\$826m) declined 20% from last year, though remains up on 2019 (+22%). Holiday spend (\$493m) was also down 20% on 2023, but up 19% on 2019.

NEW SOUTH WALES

Total visitation from NSW exceeded 2019 levels in early 2023, and has remained elevated since, however at YE June 2024 was down 12% from 2023 (up 10% on 2019). Total spend (\$840m) was down 15% from 2023, but up 32% on 2019, while holiday spend (\$588m) dropped 24% from 2023, or 35% up on 2019.

QUEENSLAND

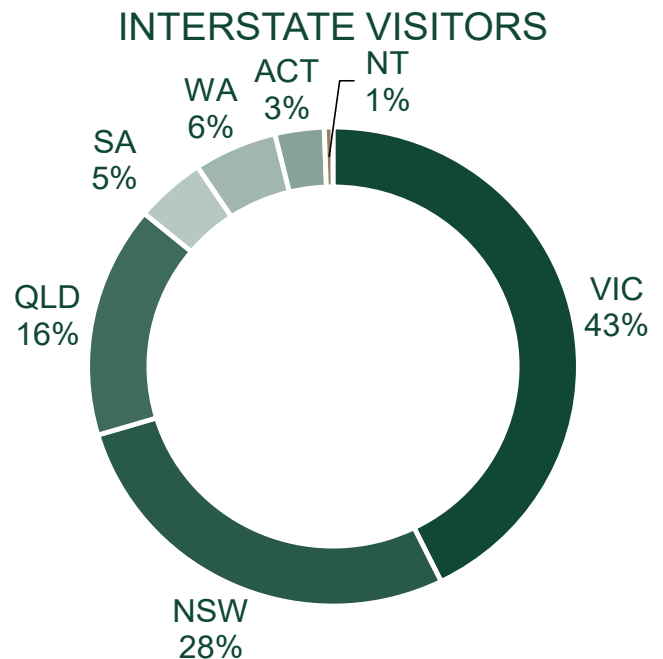
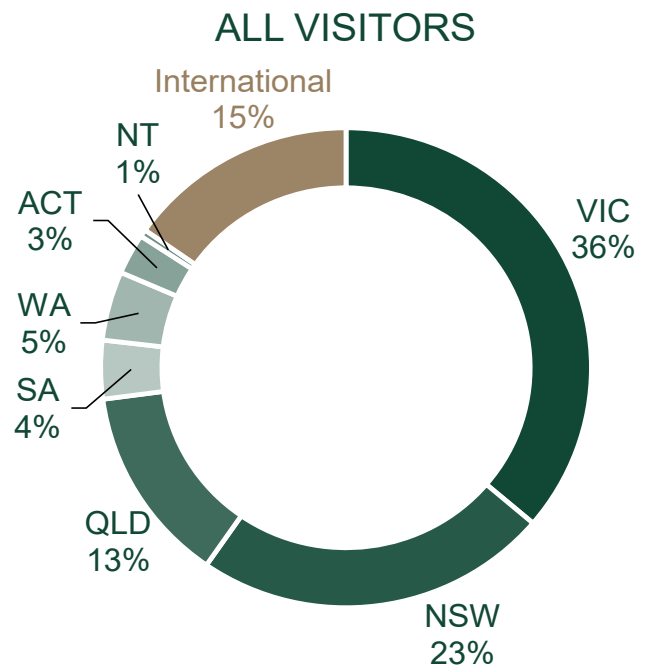
QLD visitors set a record for nights in the state (2.58m, up 4% on 2023, up 34% on 2019), and was the only market of the top three interstate markets to see more visitors (+20%) than in 2019. QLD holiday visitors also exceeded pre-COVID visitation (+39%) and expenditure (+80%) in the YE June 2024, however also saw drops from last year.

SOUTH AUSTRALIA

In the year ending March 2024, SA set spend and visitation records across both total and holiday visitors; however at YE June 2024 these have softened by -2% and -6% respectively (YE June 2024 on YE March 2024). SA contributes around 6% of all visitors to the state, though was the only interstate market to see visitation growth from both 2019 and 2023.

INTERNATIONAL MARKETS

Tasmania’s international visitor recovery leads the national average for nights (TAS 108%, national average 102%) and is on par for visitation (85% of YE June 2019). Spend recovery still lags the national average (TAS 96%, compared to 107%).



Tasmania traditionally sees a higher than average proportion of its international visitors visiting for a holiday, compared to visiting friends or relatives, business, or education, and this market is still recovering (75% of 2019).

In the year ending June 2024, Tasmania’s share of holiday visitors to Australia was 5.29% (5.22% in 2019).

TOTAL VISITORS TO TASMANIA

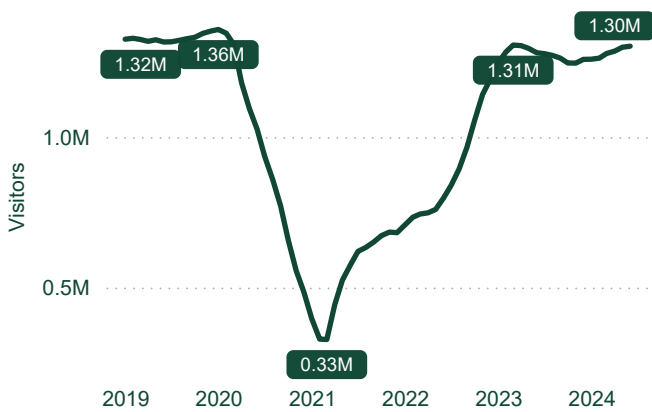
ALL VISITORS*

1.30M Visitors ▲ 1.7% 98.9% of 2019	12.85M Visitor Nights ▲ 7.2% 118.1% of 2019	\$3.48bn Visitor Spend ▼ -9.7% 138.9% of 2019	9.9 ALOS (Nights) ▲ 5.5% 119.3% of 2019	\$2.672K ASPV ▼ -11.2% 140.4% of 2019	\$271 ASPN ▼ -15.8% 117.7% of 2019
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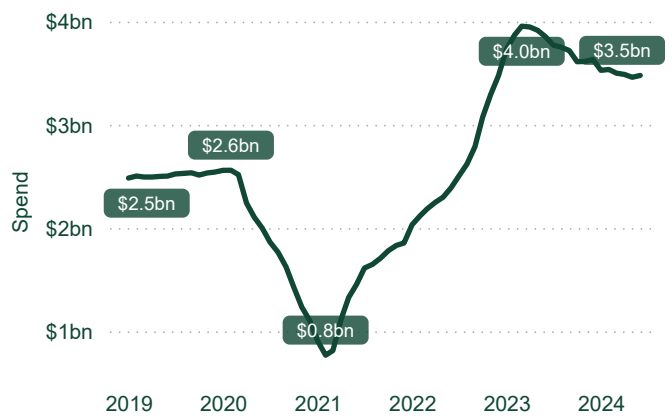
ALL HOLIDAY VISITORS

697.92K Visitors ▲ 0.6% 112.3% of 2019	6.76M Visitor Nights ▼ -1.5% 119.7% of 2019	\$2.44bn Visitor Spend ▼ -10.7% 147% of 2019	9.7 ALOS (Nights) ▼ -2.1% 106.6% of 2019	\$3.497K ASPV ▼ -11.3% 131% of 2019	\$361 ASPN ▼ -9.4% 122.9% of 2019
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ROLLING ANNUAL VISITATION TO TASMANIA



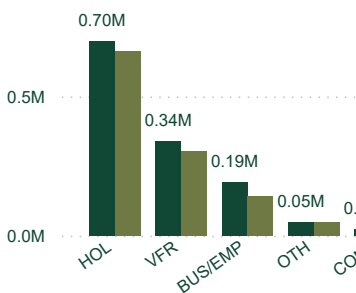
ROLLING ANNUAL SPEND IN TASMANIA



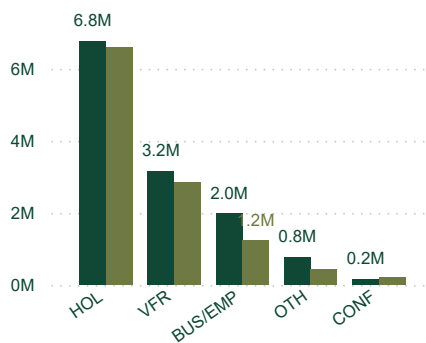
PURPOSE OF VISIT TO TASMANIA

VISITORS

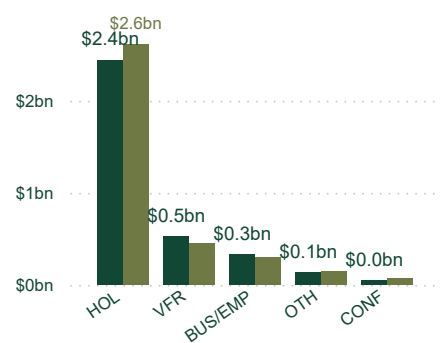
● Selected Year ● Previous Year



NIGHTS



SPEND



▲ Increase
▼ Decrease

% Change is from previous year.

* Total visitors is interstate and international, excluding Tasmanians and cruise ships.

ALOS: Average length of stay (nights);
ASPV: Average spend per visitor;
ASPN: Average spend per night.

More data available at www.tvsanalyser.com.au

The Tasmanian Visitor Survey is an exit survey of approximately 9,000 interstate and international visitors annually. Roy Morgan Research.

INTERSTATE VISITORS TO TASMANIA

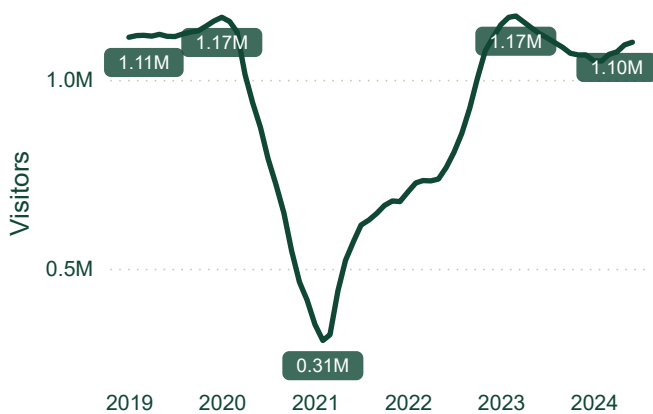
ALL INTERSTATE VISITORS*

1.10M Visitors ▼ -2.1% 98.6% of 2019	10.77M Visitor Nights ▲ 4.4% 123.9% of 2019	\$2.86bn Visitor Spend ▼ -14.6% 140.3% of 2019	9.8 ALOS (Nights) ▲ 6.6% 125.7% of 2019	\$2.600K ASPV ▼ -12.8% 142.3% of 2019	\$265 ASPN ▼ -18.1% 113.2% of 2019
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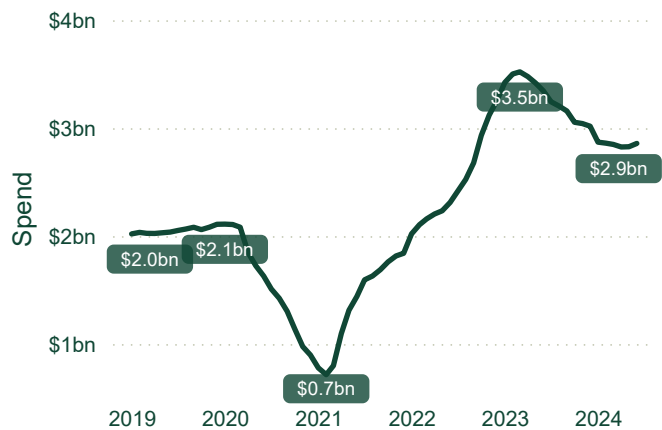
INTERSTATE HOLIDAY VISITORS

545.74K Visitors ▼ -6.7% 113.4% of 2019	5.45M Visitor Nights ▼ -7.3% 122.1% of 2019	\$1.94bn Visitor Spend ▼ -17.4% 147.9% of 2019	10.0 ALOS (Nights) ▼ -0.6% 107.6% of 2019	\$3.556K ASPV ▼ -11.4% 130.4% of 2019	\$356 ASPN ▼ -10.9% 121.1% of 2019
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ROLLING ANNUAL VISITATION TO TASMANIA



ROLLING ANNUAL SPEND IN TASMANIA



STATE OF ORIGIN

States	Visitors	Nights '000	Spend \$m	ALOS	ASPV	ASPN	% Share visitors from state			
							Holiday	VFR	Business	Other
VIC	416,400	3,130	\$826	7.5	\$1,983	\$264	44%	27%	22%	5%
NSW	301,800	3,023	\$841	10.0	\$2,785	\$278	54%	28%	14%	3%
QLD	209,900	2,578	\$657	12.3	\$3,129	\$255	53%	30%	11%	2%
SA	78,800	718	\$209	9.1	\$2,649	\$291	53%	26%	15%	5%
WA	55,600	836	\$221	15.0	\$3,967	\$264	55%	29%	8%	5%
ACT	29,100	306	\$75	10.5	\$2,578	\$245	42%	33%	15%	8%
NT	6,900	176	\$28	25.5	\$3,994	\$157	49%	24%	16%	9%

▲ Increase
▼ Decrease

% Change is from previous year.
* Interstate refers to Australian travellers, excluding Tasmanians and cruise.

ALOS: Average length of stay (nights);
ASPV: Average spend per visitor;
ASPN: Average spend per night.

More data available at www.tvsanalyser.com.au

The Tasmanian Visitor Survey is an exit survey of approximately 9,000 interstate and international visitors annually. Roy Morgan Research.

REGIONAL VISITATION

Interstate holiday makers is the main market for regions, and all saw a decline from the previous year; however, all maintained a higher rate of interstate holiday visitation compared to YE June 2019.

SOUTHERN

The return of international visitors, and to a lesser extent an increase of interstate visitors, continued the positive trend for the South. More visitors (77.5%) included a stop in Hobart in YE June 24 than in 2023 or 2019 (73.9% and 72.0% respectively). The South has maintained over 1m visitors since YE Jan 2024 - leading to the stronger growth than visitation to the state overall.

NORTHERN

Visitation steadily improved through the first half of 2024, following a softening across late 2023, resulting in total interstate and international visitation being on par with YE June 2023. International visitors in the state for a holiday, and Australians for business or employment, led the recovery, and offset the drop in interstate holiday visitors from the previous year.

EAST COAST

The East Coast had the strongest return of visitation of the regions, with total interstate and international visitation up 23% on YE June 2019 (up 5% on 2023). A drop in interstate holiday visitors (-10%) pulled down the total interstate visitation from last year, although interstate visitation was up 25% on 2019.

NORTH WEST

The NW saw a decline in interstate holiday visitors from YE June 2023 (-17%), and although more international visitors spent time in the NW than before COVID (+9% on YE June 2019), those gains didn't fully offset the drop from the key interstate holiday market.

WEST COAST

Visitation has been steadily coming down from a record high at YE March 2023 (which was +26% on YE Jun 19, +35% for interstate holiday), and YE June 2024 was down 10% from YE Jun 2023, while interstate visitation remains 20% up on YE Jun 2019.

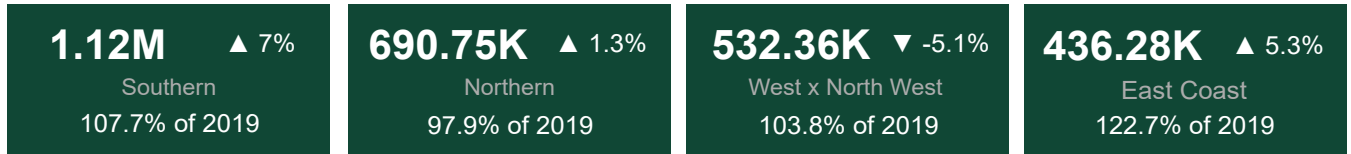
ALL VISITORS	Visitors ('000)				Nights (m)			
	YE Jun 23	YE Jun 24	Annual Change	Change on YE Jun 19	YE Jun 23	YE Jun 24	Annual Change	Change on 2019
SOUTHERN	1,047.6	1,121.2	7%	8%	5.774	6.476	12%	28%
NORTHERN	681.6	690.8	1%	-2%	1.999	2.123	6%	-9%
EAST COAST	414.2	436.3	5%	23%	1.068	1.064	0%	26%
WXNW	560.7	532.4	-5%	4%	2.243	2.392	7%	14%
NORTH WEST	539.5	517.6	-4%	5%	1.647	1.809	10%	10%
WEST COAST	225.9	217.6	-4%	18%	0.596	0.583	-2%	26%

INSTERSTATE VISITORS	Visitors ('000)				Nights (m)			
	YE Jun 23	YE Jun 24	Annual Change	Change on YE Jun 19 ³	YE Jun 23	YE Jun 24	Annual Change	Change on YE Jun 19
SOUTHERN	907.8	928.3	2%	8%	4.944	5.413	9%	31%
NORTHERN	587.4	558.6	-5%	-4%	1.759	1.804	3%	1%
EAST	339.8	331.3	-3%	25%	0.880	0.853	-3%	33%
WXNW	484.4	433.6	-10%	4%	1.976	2.018	2%	20%
NORTH WEST	466.0	421.5	-10%	4%	1.446	1.513	5%	18%
WEST COAST	191.5	172.2	-10%	20%	0.529	0.505	-5%	24%

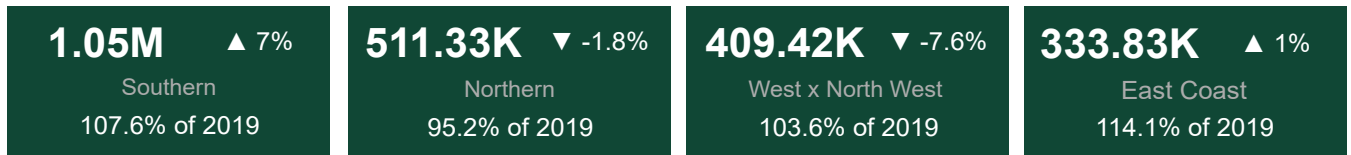
VISITATION TO TOURISM REGION

INTERSTATE AND INTERNATIONAL

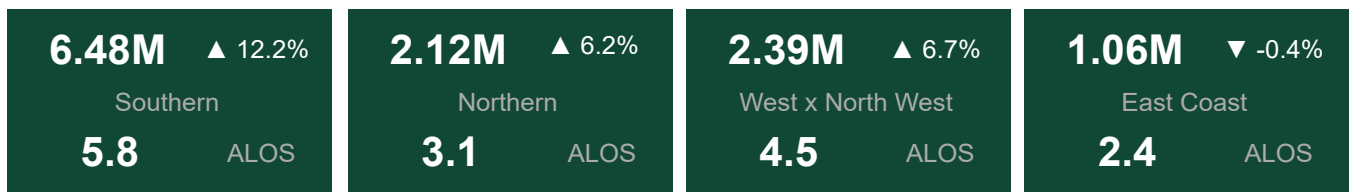
VISITORS TO REGIONS



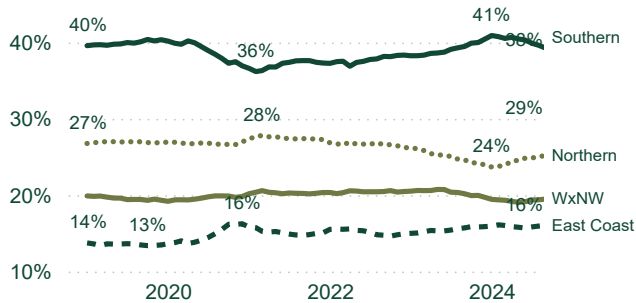
OVERNIGHT VISITORS[^]



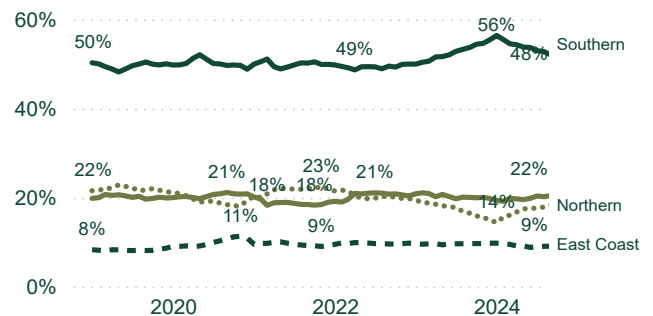
NIGHTS IN REGIONS



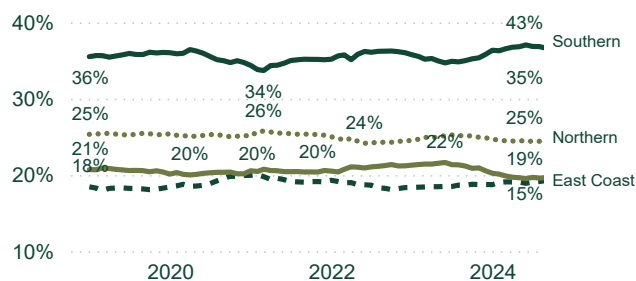
ROLLING ANNUAL SHARE* OF VISITORS BY REGION



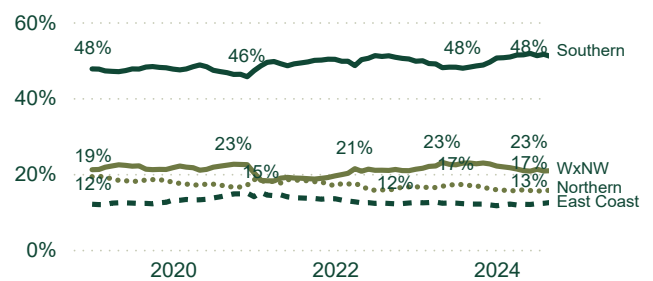
ROLLING ANNUAL SHARE OF NIGHTS BY REGION



ROLLING ANNUAL SHARE OF HOLIDAY VISITORS



ROLLING ANNUAL SHARE OF HOLIDAY NIGHTS



▲ Increase
▼ Decrease

% Change is from previous year.

[^] Visitors who stayed at least one night in the region.

* Share of visitors refers to share of total to the state

ALOS: Average length of stay (nights);
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INTERNATIONAL VISITATION

International visitation data on this page comes from Tourism Research Australia's International Visitor Survey (IVS).

Post-pandemic international travel into Australia and Tasmania continued to increase throughout 2023,-24 with Tasmania's share of all international visitors to Australia at 3.48% (3.49% in 2019), and 5.29% of holiday visitors (5.22% in 2019).

International visitation to Tasmanis was at 85% of YE June 2019, spend 107% and nights 102%.

		SPEND		VISITORS		NIGHTS
VISITATION TO AUSTRALIA	\$47.773B	+7.2% on 2019	7.353M	-14.5% on 2019	278.17M	+1.9% on 2019
VISITATION TO TASMANIA	\$505.4M	-4.4% on 2019	255,800	-14.8% on 2019	4.88M	+8.2% on 2019

TOP 5 VISITOR COUNTRY OF ORIGIN		YE Jun 2019	YE Jun 2024	Change on 2019
50% Int'l Visitors	United States of America	45,500	40,600	-11%
	United Kingdom	26,600	24,800	-7%
	Hong Kong	28,000	23,500	-16%
	China	44,400	21,400	-52%
	New Zealand	21,900	19,200	-13%
	Other Countries	133,800	126,400	-6%
TOTAL INTERNATIONAL VISITORS TO TASMANIA		300,300	255,800	-15%

INTRASTATE VISITATION

Intrastate visitation data on this page comes from Tourism Research Australia's National Visitor Survey (NVS).

Tasmanians spent over \$1.8b on trips within the state in the year ending June 2024, across overnight trips (\$1.03b) and day trips (\$780m).

Tasmanians took 21% more overnight trips within the state compared to the previous year, with trips lasting an

average of 2.3 nights away (down 0.2 nights on 2019).

Although Tasmanians took more trips, they spent less per night (\$255, down 8%, or \$22 per night from 2023), leading to softer growth in total spend.

Spend by Tasmanians taking overnight trips for a holiday was up 31% to \$425m, with the number of trips, and nights, both up 37% on year ending June 2023.

	YE Jun 23	YE Jun 24	Annual Change	Change vs YE Jun 2019
SPEND	\$0.98b	\$1.03b	+6%	+14%
OVERNIGHT TRIPS	1.44m	1.74m	+21%	+1%
NIGHTS	3.53m	4.05m	+15%	-9%

DAY TRIPS	5.72m	5.24m	-8%	-22%
SPEND	\$718	\$782	+9%	+11%

INTERNATIONAL VISITORS TO TASMANIA

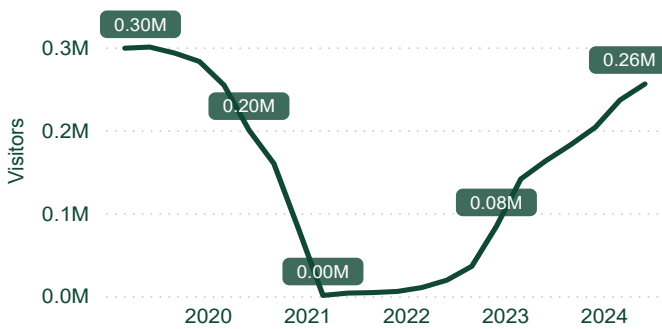
ALL VISITORS

255.80K Visitors ▲ 56.8% 85% of 2019	4.88M Nights ▲ 100.9% 108% of 2019	\$505M Spend** ▲ 76.5% 96% of 2019	19.09 ALOS (Nights) ▲ 28.1% 2019: 15	\$1,976 ASPV ▲ 12.6% 2019: \$1760	\$103 ASPN ▼ -12.5% 2019: \$117
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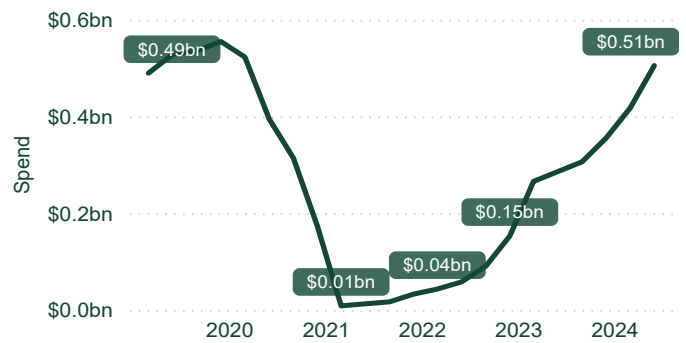
HOLIDAY VISITORS

185.93K Visitors 76% of 2019	2.32M Nights 112% of 2019	\$328M Spend** 104% of 2019	12.45 ALOS (Nights) 2019: 8.5	\$1,764 ASPV 2019: \$1298	\$142 ASPN 2019: \$153
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ROLLING ANNUAL VISITATION TO TASMANIA



ROLLING ANNUAL SPEND IN TASMANIA



PRIMARY INTERNATIONAL SOURCE MARKETS

Markets	Visitors	Nights '000	Spend \$m	ALOS (nights)	ASPV	% Share visitors from country				
						HOL	VFR	BUS	EDU	Other
USA	40,600	240	47	5.9	\$1,170	77%	21%	3%		1%
UK	24,800	426	42	17.2	\$1,682	65%	26%	6%	2%	7%
Hong Kong	23,500	234	69	10.0	\$2,953	95%	8%		1%	11%
China	21,400	314	43	14.7	\$2,014	62%	34%	3%	2%	
New Zealand	19,200	199	38	10.4	\$1,993	63%	25%	13%		6%
Singapore	12,000	87	27	7.2	\$2,218	90%	9%		1%	

▲ Increase
▼ Decrease

+ % Change is from previous year.

++ IVS data up to December 2022 is based on imputations from pre-COVID visitor behaviours. Interviews resumed in January 2023.

* The IVS records purpose of visit per stopover, so a single 'trip' will include multiple purposes and therefore may add to more than 100%.

^ % 2019 refers to comparison to *calendar year* 2019

ALOS: Average length of stay (nights)

ASPV: Average spend per visitor

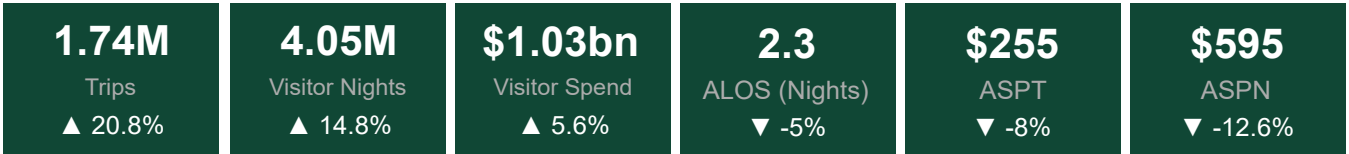
ASPN: Average spend per night.

The International Visitor Survey interviews 40,000 overseas travellers in person in Australia's eight major international airports.

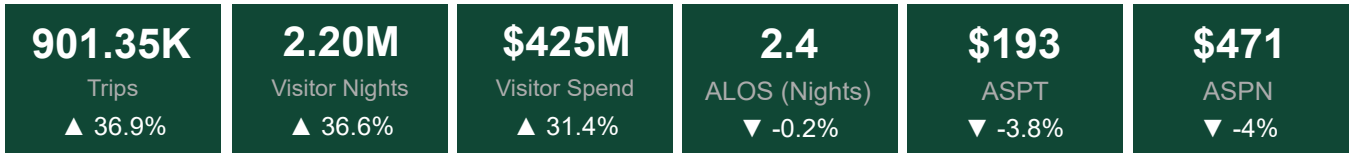
The IVS is conducted by Tourism Research Australia

INTRASTATE TRIPS WITHIN TASMANIA

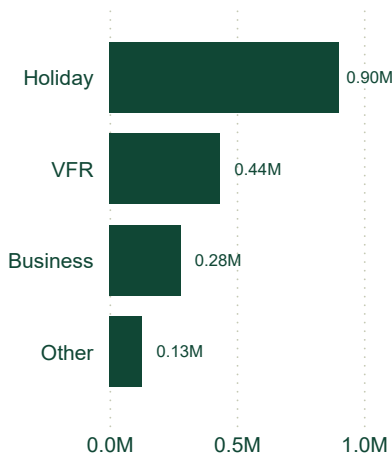
OVERNIGHT TRIPS



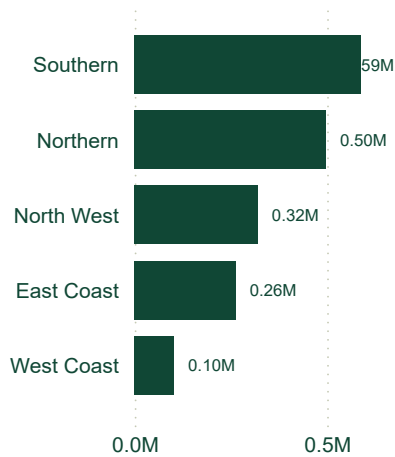
HOLIDAY OVERNIGHT TRIPS*



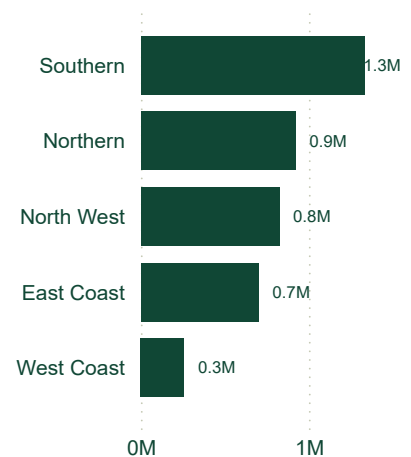
PURPOSE OF OVERNIGHT TRIP



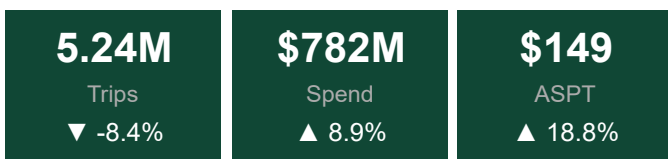
OVERNIGHT TRIPS IN REGIONS



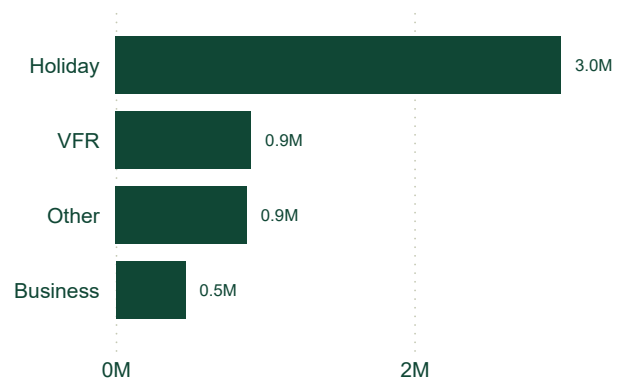
NIGHTS IN REGIONS



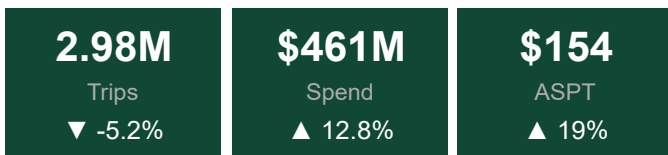
DAY TRIPS



PURPOSE OF DAY TRIP



HOLIDAY DAY TRIPS^



▲ Increase
▼ Decrease

% Change is from previous year.

*The NVS records purpose of visit per stopover, so a single 'trip' will include multiple purposes and therefore may add to more than 100%

ALOS: Average length of stay (nights);
ASPT: Average spend per trip;
ASPN: Average spend per night

The National Visitor Survey is a mobile phone survey of approximately 60,000 Australians annually. The NVS is conducted by Tourism Research Australia.

TASMANIAN ACCOMMODATION

Tourism Tasmania measures a range of metrics of visitation into the state and across the visitor economy. Accommodation data provides insight into the demand from travellers in the state.

Tourism Tasmania has engaged two providers to deliver meaningful data that broadly represents the range of Tasmanian accommodation operators.

STR - COMMERCIAL ACCOMMODATION

STR provides accommodation operators an opt-in system to add their data to an anonymous aggregate report, drawing on a broad capture of platforms and booking systems, across a wide range of accommodation types. STR takes into account operator size, rating, brand affiliation and rates.

The STR occupancy data provides insight for four regions; Hobart and the South, Launceston and the North, East Coast, and North West. The zones align with the state's Tourism Regions, except for the North West which excludes the West Coast due to insufficient sample.

Tourism Tasmania actively encourages providers of hotel, motel, lodge or similar accommodation to contribute to this anonymous dataset to continually improve the

reliability of the data. Please contact Jacqueline (jchoo@str.com) to contribute anonymously to industry insights and monitoring, and access your own bespoke report.

AIRDNA - SHORT-STAY ACCOMMODATION

AirDNA provides an indicative view of the shortstay accommodation sector, including holiday homes, shacks, homes and self-contained apartments, as well as some traditional bed and breakfasts, listed on on Airbnb or VRBO.

Data is provided across multiple regions, offering a view of urban and regional performance. Data in this snapshot refers only to 'entire properties', where guests have the entire home, hotel room or apartment to themselves; approximately 89% of listings in Tasmania. This can be a standalone building or self-contained apartment.

TASMANIAN HOSPITALITY ASSOCIATION (THA)

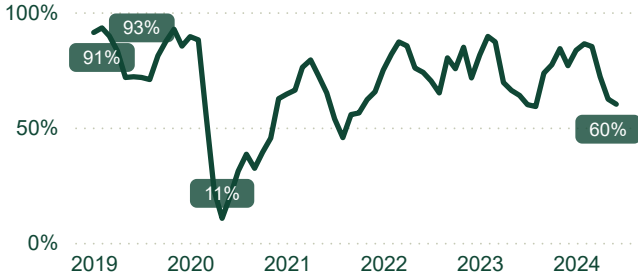
The THA collects accommodation demand insights from a cross-section of its members, and is published separately to this Snapshot. While there may be some duplication of sample with STR, the sample size of rooms is smaller for THA than the STR coverage.

AIRDNA REPORTING ZONE	REGIONS INCLUDED
HOBART	Hobart City Council
LAUNCESTON	Launceston City Council
WEST COAST	West Coast Council
BRUNY ISLAND	North & South Bruny Island
TASMAN PENINSULA	Tasman Council
HUON - FAR SOUTH	Huon Valley Council
KING ISLAND	King Island Council
FLINDERS ISLAND	Flinders Council
DERBY	Derby, Branxholm, Ringarooma, Pioneer
EASTERN SHORE (HOBART)	Geilston Bay to Tranmere, incl. Mornington
ORFORD	Orford, Spring Beach, Triabunna, Little Swanport
FREYCINET	Coles Bay, Swanwick, Bicheno, Swansea
NORTH WEST	Circular Head, Waratah-Wynyard, Burnie, Devonport, Central Coast, Kentish & Latrobe LGAs
NORTH EAST COAST	Bay of Fires, St Helens, Wellborough, Douglas River
EAST TAMAR - BRIDPORT	George Town Council, Bridport
DELORAINE - EVANDALE	Deloraine, Mole Creek, Westbury, Evandale

COMMERCIAL ACCOMMODATION IN TASMANIA

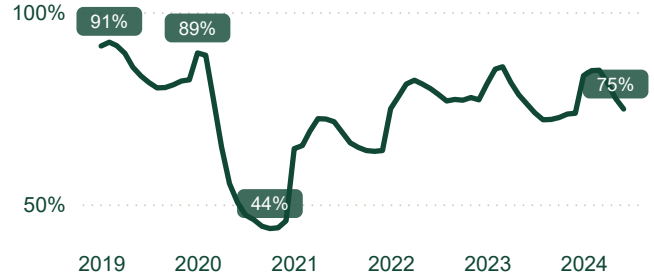
OCCUPANCY BY MONTH

Hobart & the South

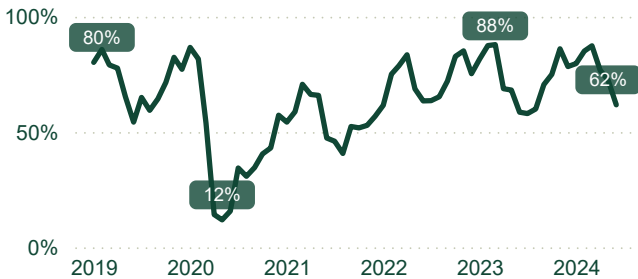


OCCUPANCY BY ROLLING YEAR ENDING

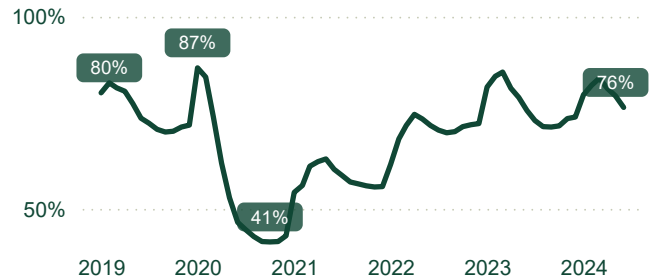
Hobart & the South



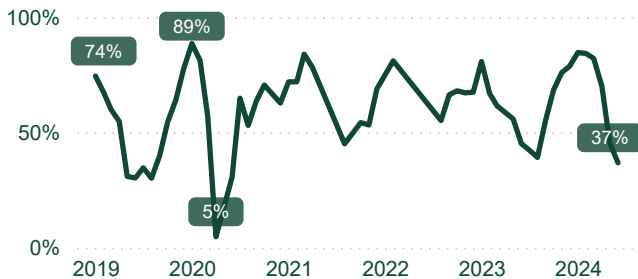
Launceston & the North



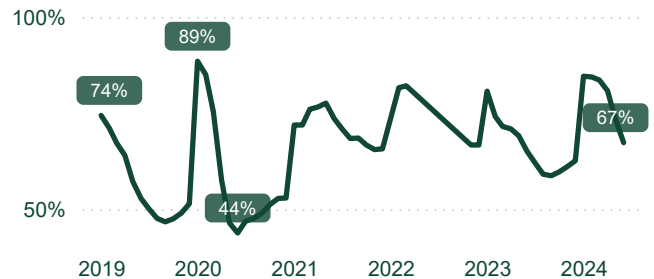
Launceston & the North



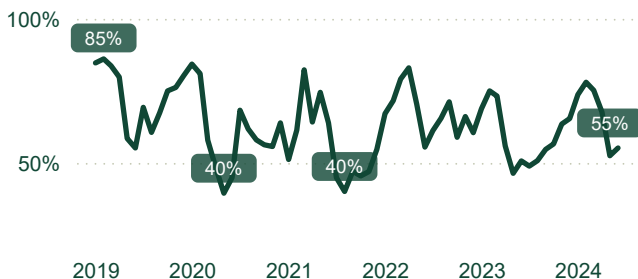
East Coast



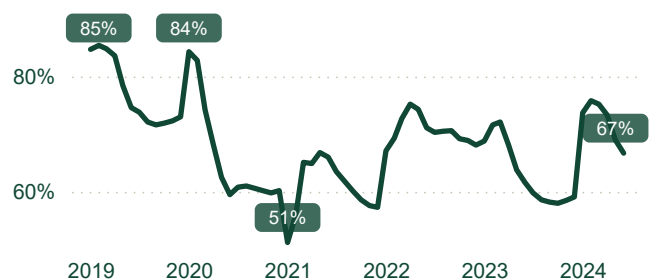
East Coast



North West



North West



Source: STR

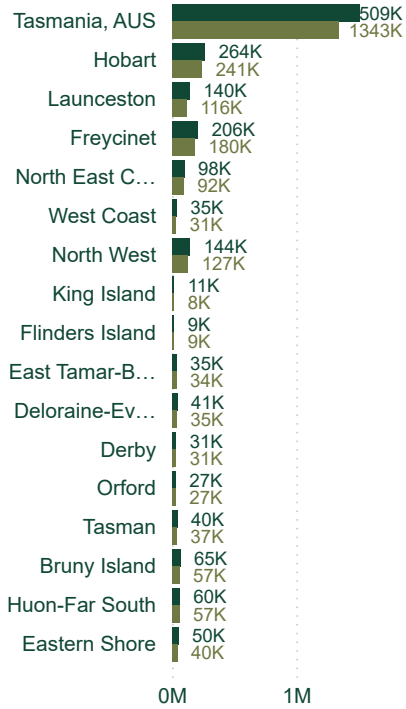
Some months are omitted due to insufficient sample.

Accommodation operators are invited to contact Jacqueline (jchoo@str.com) to access your own bespoke report and contribute anonymously to industry insights and monitoring.

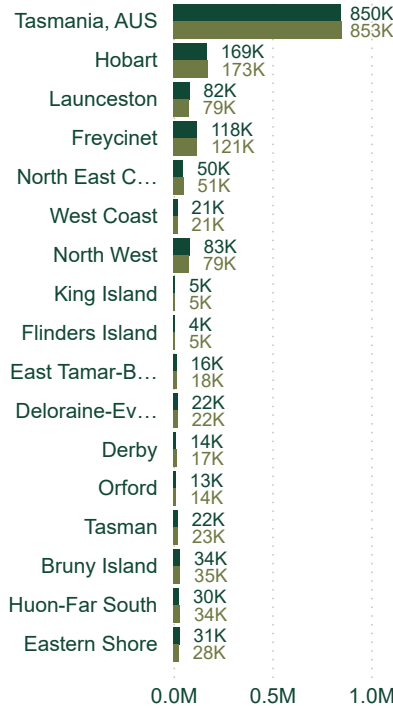
SHORT-STAY ACCOMMODATION IN TASMANIA

● Year Ending June 24 ● Year Ending June 23

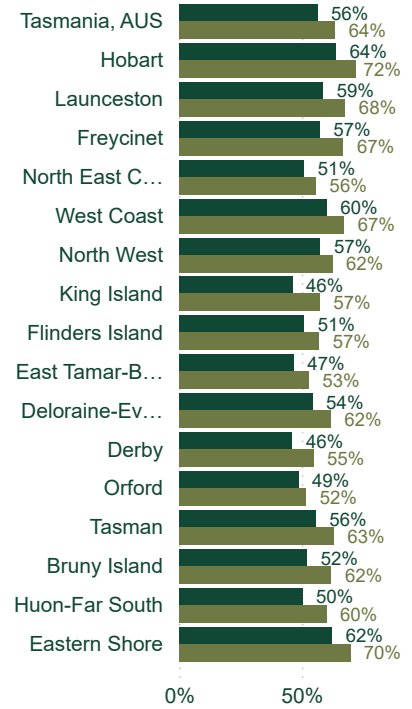
Supply (Nights Available)



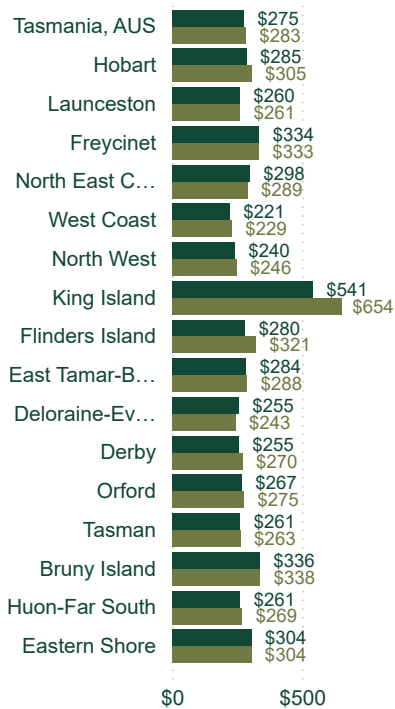
Demand (Nights Booked)



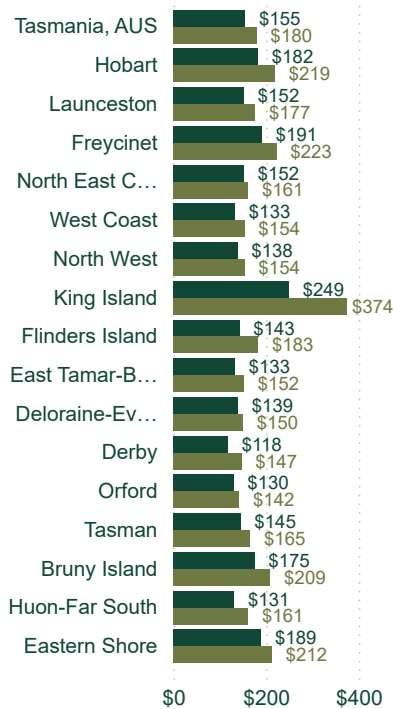
Occupancy (%)



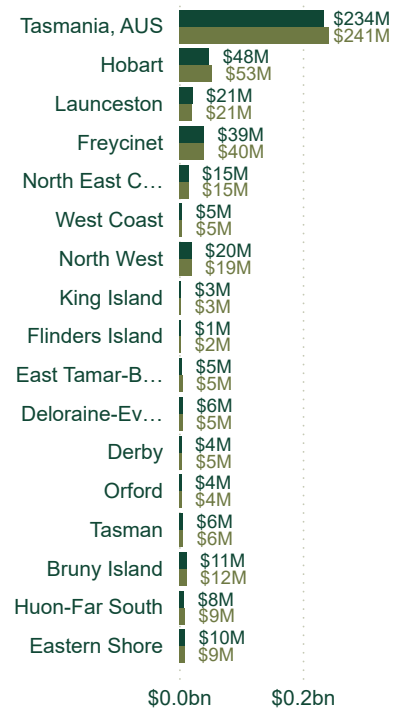
ADR (\$)



RevPAR (\$)



Revenue Estimated (\$m)



Source: AirDNA
Data shown is for 'entire properties' only.
% change is compared to the previous year.

Revenue, ADR and RevPAR are converted from USD at exchange rate of 1.50 as at 19 June 2024 for YE March 2024 totals and therefore AUD contribution is estimated only. Includes cleaning fees but not other Airbnb or VRBO service fees.

ABOUT THIS SNAPSHOT

The Tasmanian Tourism Snapshot is published every quarter, using the latest figures from the Tasmanian Visitor Survey (TVS) and supplementary sources to provide you with an overview about international and interstate visitors to Tasmania, as well as intrastate travel by Tasmanians. Accommodation data from AirDNA and STR are also featured. More detailed statistics are available at Tourism Tasmania's corporate website at www.tourismtasmania.com.au/research and via the interactive TVS Analyser www.tvsanalyser.com.au

DATA SOURCES

TASMANIAN VISITOR SURVEY (TVS)

The TVS is an exit survey designed to provide a profile of the characteristics, travel behaviour and expenditure of international and domestic visitors to Tasmania. It is nationally acknowledged as the most reliable source of statistical data on visitors to Tasmania, and is based on a sample of more than 9,000 departing visitors per year. Interviews take place at the states' four main airports, as well as the Spirit of Tasmania terminal. www.tourismtasmania.com.au/research/tvs

INTERNATIONAL VISITOR SURVEY (IVS)

NSW holiday-makers exceeded 2019 levels (+7%), with The IVS is administered by Tourism Research Australia. The IVS is the most comprehensive source of information on international visitors to Australia. Prior to COVID-19 the IVS sampled, on average, 40,000 departing, short-term international travellers in the departure lounges of eight international airports across Australia (not including Hobart). Between April 2020 and December 2022 the IVS utilised incoming passenger cards and algorithms supplemented by surveys. January 2023 saw the full re-introduction of survey-based sampling. www.tra.gov.au/international

NATIONAL VISITOR SURVEY (NVS)

The NVS is also administered by Tourism Research Australia, and samples approximately 60,000 Australians annually. Unlike the IVS, the NVS continued uninterrupted during the COVID pandemic as it is entirely based on mobile phone calls. The NVS provides the only nationally comparable travel data for Tasmanians within their own state. www.tra.gov.au/domestic

A NOTE OF CAUTION

You are advised to exercise care when interpreting figures contained in this report and the TVS Analyser. Figures are an estimate based on a sample of visitors, and may, therefore, be different from the real figure if data from 100% of all visitors could have been collected. These estimates may be subject to chance variation or sampling error, and smaller estimates under 5,000 must be treated with greater caution. Figures that show a change ≤ 2 per cent are shown as remaining steady due to sampling variability, please view the Confidence Interval Tables for further information, available at www.tourismtasmania.com.au/research/tvs.

NOTES

1. Annual change refers to the percentage change between the year covered by this snapshot compared to the year prior.
2. All visitors refers to interstate and international, excludes intrastate (Tasmanians).
3. Change on 2019 refers to the percentage change between the year covered by this snapshot compared to the same period in 2019, unless otherwise stated.